

How to Guide for Entering Coordinated Entry Client Referrals

Updated October 2022

1. Log in to HMIS using the **“2020 Coordinated Entry”** workgroup and choose your **“Coordinated Entry Region #”** as the organization.

PROFILE



Grant Peters
gpeters@ihcda.in.gov
Indiana HMIS Train

ACCOUNT SETTINGS

Workgroup

2020 Coordinated Entry

Organization

Coordinated Entry Region 1

Location



Apply

[Open Workgroup Designer](#)

[Security Settings](#)

[Clear Preferences](#)

[Sign Out](#)

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2. From the “**Client’s** workspace, click on “**Find Client**” located in the left-hand menu.
3. Search for the Client using one of the following: **Name, SSN, DOB, or Client ID#**
4. Click the “**Search**” button located on the right-hand side of the screen.

Search

Find Client

Coordinated Entry Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Dashboard

Edit Client

Client CE Consent Forms

Case Notes

Assessments

Referrals

Services

Enrollments

Family Members

Paused Workflows

Michelangelo Turtle 1/1/1990 123-45-6789 ClientID 1048331

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number:

Birth Date:

Client ID:

Search

5. A list of names will appear that match your search criteria. Double click on the correct Client.

Search

Find Client

Coordinated Entry Intake

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Find Client

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First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number:

Birth Date:

Client ID:

Search

1 result found.

First Name	Last Name	Middle Name	SSN	Birth Date	Client ID
Michelangelo	Turtle		XXX-XX-6789	01/01/1990	1048331

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- This brings us to the **“Client Dashboard”**. From this screen, move your cursor to the menu on the left side of the screen and click on **“Referrals”**.

Michelangelo Turtle's Dashboard

Michelangelo Turtle's Information

Name: Turtle, Michelangelo Birth Date: 1/1/1990 Age: 32
Gender: Male Veteran: Client Doesn't Know
Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race: Client doesn't know

Michelangelo's Enrollments

2 results found.

Enrollment Description	Case Members	Project Start Date	Exit Date	Housing Move-In Date	Enroll ID	Exit ID	Exit Destination	Organization	Last Assessment Completed
My Fake Organization Coordinated Entry (R1a)	2	10/27/2022						My Fake Organization	
My Fake Organization ES (ES-RB)	1	10/24/2022			1971910			My Fake Organization	10/24/2022

Michelangelo's Case Manager Assignments

1 result found.

All Associated

- On the next screen, click on **“Add New”**.

Client Referrals

Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New** button. To view or edit a record displaying in the list, click **Edit** next to the desired record. To get directions from the client's address to the provider, click the on the provider's name. To print a referral voucher, click **Referral Voucher** next to the desired record.

+ Add New Quick Referrals Incoming Referral

No records found.

Status	Service	Provider	Date	Incoming	Approx Distance (in mi.)
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8. You are now on the Referral screen. Click on the **“Referral Service”** drop down box arrow then click on the appropriate CE Referral for your Client. **All CE Referrals begin with “CE”**.

The screenshot shows the 'Referral' form in the HMIS system. The form is titled 'Referral' and shows client information for Michelangelo Turtle. A red box highlights the 'Referral Service' dropdown menu, which is set to 'CE - Referral to Emergency Housing Voucher'. A large red arrow points down towards the 'Save' button at the bottom right of the form.

9. Click on the **“Enrollment”** drop down box arrow then click on **“Coordinated Entry”**.
- For **“Refer to Provider”** click on the magnifying glass which will bring up the Providers in your area who have been entered and tied to the Referral you have selected. Click on the appropriate Provider.
 - In the small **“Comments”** box you can add a brief note about the Referral if you so choose. The **“Comments”** box is not a required field and can be left blank.
 - Click on the drop-down box arrow for the **“Result”** field and choose the appropriate response. The three response choices are: **“Attained”**, **“Not Attained”** and **“Unknown”**.
 - Last, enter the date in the **“Result Date”** field.
 - Click **“Save”** in the bottom right corner of the screen.
 - The Referral has now been recorded in the Client’s record.

PLEASE NOTE: Only Referrals with the prefix of “CE- “are to be used for Coordinated Entry Client Referrals.

Please check with the HMIS System Administrator at your organization to make sure the Providers have been added for your area and linked to the appropriate CE-Referrals in the **“2020 Coordinated Entry Workgroup”**. There is a separate process for **“Adding and Linking Providers”** that must be completed before your organization can begin entering Referrals for Coordinated Entry. Please contact the HMIS Help Desk at: HMISHelpDesk@ihcda.IN.gov with questions.